

**Withholding Info W4-W5 Election**

**PA30**

**Change History**

Update the following table as necessary when this document is changed:

Date	Name	Change Description
12/15/2004	Ligaya West	Updates & Edits
1/27/2006	Heather Hanson	Update
5/14/2009	Patty Peterson	Update description of Start Date field.
1/11/2010	K. Welsh	Updated screen shots to match current system. Added note for Start date field if completing for a new hire.

### **Purpose**

Use this procedure to maintain (change) an employee's W-4 or W-5 election.

### **Trigger**

Perform this procedure when there is a change requested by an employee that affects their W-4 withholdings.

### **Prerequisites**

- The employee must be in active status.

### **Menu Path**

Human Resources → Personnel Management → Administration → HR Master Data → Maintain

### **Transaction Code**

**PA30**

### **Helpful Hints**

The Payroll Processor will use this procedure to update an employee's W4 or W5 information.

## Procedure

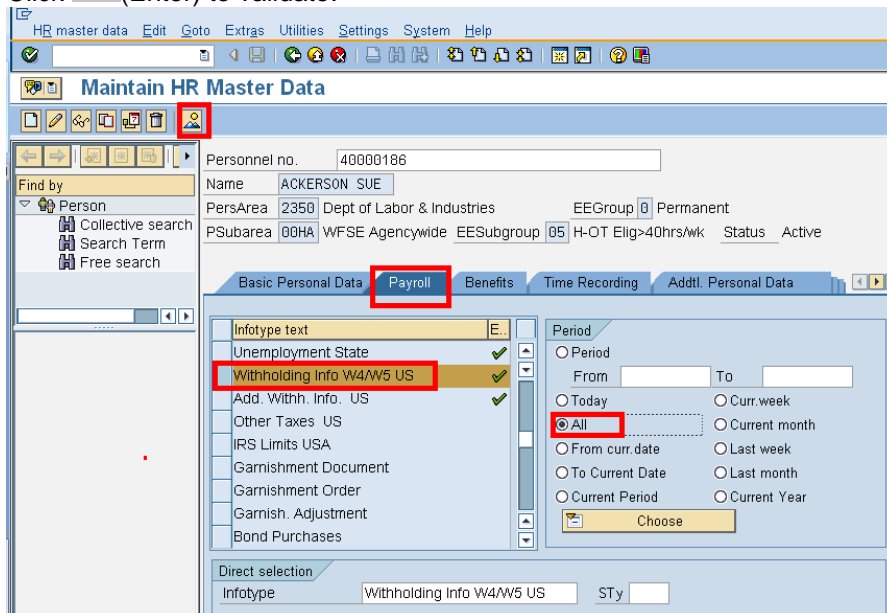
1. You have started the transaction using the menu path or transaction code.

### Maintain HR Master Data

2. As required, complete/review the following fields:

Field Name	R/O/C	Description
Personnel no.	R	This is a unique identifying number assigned by HRMS for identification purposes. This number will follow the employee throughout his/her employment with the State of Washington. This will replace the use of identifying employees by social security number. <b>Example:</b> 40000186

3. Click  (Enter) to validate.



HR master data Edit Goto Extras Utilities Settings System Help

**Maintain HR Master Data**

Personnel no. 40000186  
 Name ACKERSON SUE  
 PersArea 2350 Dept of Labor & Industries EEGroup 0 Permanent  
 PSubarea 00HA WFSE Agencywide EESubgroup 05 H-OT Elig>40hrs/wk Status Active

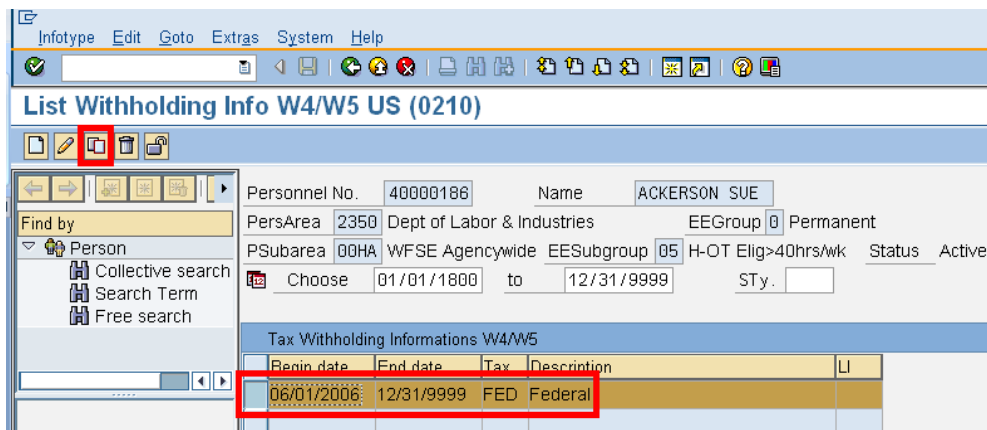
Basic Personal Data **Payroll** Benefits Time Recording Addtl. Personal Data

Infotype text E.  
 Unemployment State ✓  
**Withholding Info W4/W5 US** ✓  
 Add. With. Info. US ✓  
 Other Taxes US  
 IRS Limits USA  
 Garnishment Document  
 Garnishment Order  
 Garnish. Adjustment  
 Bond Purchases

Period  
 From To  
 Today Curr. week  
**All** Current month  
 From curr. date Last week  
 To Current Date Last month  
 Current Period Current Year  
 Choose

Direct selection  
 Infotype Withholding Info W4/W5 US STy

4. Select the **Payroll** tab. Scroll down and click the grey box to the left of *Withholding Info W4/W5 US* (Infotype 0210).





Infotype Edit Goto Extras System Help

**List Withholding Info W4/W5 US (0210)**

Personnel No. 40000186 Name ACKERSON SUE  
 PersArea 2350 Dept of Labor & Industries EEGroup 0 Permanent  
 PSubarea 00HA WFSE Agencywide EESubgroup 05 H-OT Elig>40hrs/wk Status Active  
 Choose 01/01/1800 to 12/31/9999 STy.

Tax Withholding Informations W4/W5

Begin date	End date	Tax	Description	LI
06/01/2006	12/31/9999	FED	Federal	

5. Click the  (Overview button)
6. Click the grey box to the left of the record to be changed.
7. Click  (Copy).

## Copy Withholding Info W4/W5 US (0210)

Infotype Edit Goto Extras System Help

**Copy Withholding Info W4/W5 US (0210)**

Personnel No. 40000186 Name ACKERSON SUE

PersArea 2350 Dept of Labor & Industries EEGroup 0 Permanent

PSubarea 00HA WFSE Agencywide EESubgroup 05 H-OT Elig>40hrs/wk Status Active

Start 06/01/2006 to 12/31/9999

Status

Tax authority FED Federal Tax level A Federal

Filing Status 02 Married

Exemptions

Allowances ☐

Tax Exempt Indicator ☐ ☐ IRS mandates

Withholding adjustments

Add withholding  USD ☐ Non-resident tax calculation

Default formula 1 PCT MTHD-RES. U Alternative formula


W-5 filing status

EIC status 0 Not applicable

Overrides (from Infotype 0234)

From date	End Date	Supplemental method	Tax override	Em...
06/01/2006	12/31/9999		0.00	0063

**4.** As required, complete/review the following fields:

Field Name	R/O/C	Description
Start (date)	R	<p>If making a W4 change:</p> <p>The Start date must be entered as the previous <b>Check Date<sup>1</sup></b> plus one day.</p> <p><b>Example:</b> The previous Check Date was 12/25/2009, then the Start (date) will be entered as 12/26/2009.</p> <p> <b>Note:</b> If this is for a <b>new hire</b> you would use the employee's <b>hire</b> date.</p> <p><sup>1</sup> <b>Check Date's</b> are listed on the HRMS Payroll Calendar <a href="http://www.dop.wa.gov/payroll/HRMS/PayrollCalendarSchedules/Pages/default.aspx">http://www.dop.wa.gov/payroll/HRMS/PayrollCalendarSchedules/Pages/default.aspx</a> which can be used to verify the <b>check date</b> as there are a few check dates that don't fall on the 10<sup>th</sup> or 25<sup>th</sup>.</p>
Filing Status	R	<p>This is a status elected by the employee for federal tax withholding.</p> <p><b>Example:</b> 02</p>
Allowances	R	<p>This is the number of dependents claimed for tax filing purposes. It affects the amount of taxes withheld from an employee's paycheck.</p> <p><b>Example:</b> 1</p>
Add.withholding	O	<p>This is an amount designated by the employee to be withheld from his/her check above the amount that will be taken due to filing status.</p> <p><b>Example:</b> 250.00</p>

Infotype Edit Goto Extras System Help

**Copy Withholding Info W4/W5 US (0210)**

Personnel No. 40000188 Name ACKERSON SUE

PersArea 2350 Dept of Labor & Industries EEGroup 0 Permanent

PSubarea 00HA WFSE Agencywide EESubgroup 05 H-OT Elig>40hrs/wk Status Active

Start 12/26/2009 to 12/31/9999

**Status**

Tax authority FED Federal Tax level A Federal

Filing Status 02 Married

**Exemptions**

Allowances 1

Tax Exempt Indicator ☐ IRS mandates

**Withholding adjustments**

Add withholding 250.00 USD ☐ Non-resident tax calculation

Default formula 1 PCT MTHD-RES. U Alternative formula ☐

**W-5 filing status**

EIC status 0 Not applicable

**Overrides (from Infotype 0234)**

From date	End Date	Supplemental method	Tax override	Em...
06/01/2006	12/31/9999		0.00	0063

5. Click  (Enter) to validate.

6. Click  (Save).



The system displays the message, "Record Changed."

7. You have completed this transaction.

## Result

You have successfully updated an employee's W-4 election while the employee is active.

Note: This procedure details how to make a change to this infotype while the employee is in active status and either requests the change or is transferring to another agency.